eRoom 7 Simple User Guide

The Open University

To go to your eRoom:

1. You will receive an email from your eRoom Coordinator inviting you to join an eRoom. Click on the link to go to the eRoom site or enter the URL **eRoom.open.ac.uk** in your browser.

2. Choose your preferred **Software Options** setting (◉ eRoom plug-in software is recommended)

3. On the Login page, enter your eRoom login name (your OUCU/usual network username and password)

4. Click OK to go to your **My eRooms page**. If you belong to more than one eRoom, select from the list which appears.

The eRoom plug-in:

You can use eRoom with just your browser or with a browser plug-in (4 MB, Windows only). Most features work the same with or without the plug-in, but the plug-in provides some extra features like rich text editing, and drag-and-drop to and from your desktop, as well as integration with Outlook Calendars and task lists.

You can change the Software Options setting via 🗂 my member info   Select the check-box labelled "Use eRoom plug-in software" and click OK or to stop using the plug-in, clear the check-box and click OK.

Your eRoom screen:

Create button – Click here to start creating **Standard items**

Tool buttons activate eRoom-wide functions, including the intercom (chat-room) and online Help

The *path* tracks your location in the eRoom (like a breadcrumb trail). Navigate by clicking the links it contains

The *map* lets you navigate and shows your location. To switch between this map, the quick search tab and your tasks list, click tabs

map , search ,

and tasks respectively. To close the map when it is open, click ✕ .To show the map when it's hidden, click

The *button bar* on the front page lets you create and search for items; see a list of your meetings and events; and open the eRoom Members list

The *item box* shows the items your project team can work with, including any hidden items that only you and your team members, as specified, can access

In the *command bar click* **commands** to show all the actions you can perform on items.

Standard items and suggested uses:

Right-mouse click on any item to: View, Edit, Rename, Cut, Copy, Paste, Delete, Mark as Read/Unread, etc.

*Folder	*Discussion	*Note	Poll	*Calendar	*Project plan	*Database	Inbox	Other file	*Link	Recycle bin	Linked folder	Dashboard
Project resources	Feedback & work collaboratively	Quickly add a web page with text and graphics		Project Team diary	Map Project tasks relationships	Log & track issues			Point members to online resources			

* Useful basic items to help your Project team get started

As your project progresses you will make use of some, or all, of the above items to aid collaboration
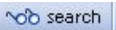Note: Requests for new/further eRooms must go through your ITSP who will raise a request (AR) ticket with AACS

Basic actions:

Create an item	Click ⁂ create in the button bar on either the upper and lower half of the front page screen.
Import a file	Click add file, browse button, then select your file.
Delete a file	Right-mouse-click on item and select **Delete**.
Display a menu	Right-mouse-click menus give you access to context-sensitive actions such as starting a real-time meeting and sharing a file at the same time, or linking a file to a Documentum repository.
Edit a file or item properties.	Right-click the icon and pick **Edit** from the pop-up menu.
Open an item	Click it, either in the map or in the item box.
Act on an item	Right-click the icon and pick a command from the pop-up menu.
Act on multiple items	On the **command** bar, click view details (▤). Select each item (☑) you want to act on. Then, either right-click and pick a command, or click a command in the command bar.

Standard controls:

▶	next unread	Click to open the next item marked unread(▶). Click repeatedly to cycle through all new information in your eRoom.
💬	intercom	Click to open the eRoom intercom so you can chat with other members or alert them to join you there. This function acts as a chat-room format for all to view your conversations; if you want to chat privately with remote members: click on a member's name to open an Outlook email message window.
◁	alert	Click to send an alert message in email to other members.
❓	help	Click to open eRoom online help.
👤	members present	More than one head icon indicates more than one member being online. Click to open intercom window.

Command buttons:

⁂ create	Click to create items.
◠ search	Click to open the "Search the eRoom" page, from which you can search for items in your eRoom based on text, ownership, or date created or modified. Also, on this page you can click ◠ search the site to launch a site-wide search for items or eRooms.
◷ meetings & events	Click to open the eRoom's Meetings & Events page, which lists current and upcoming online meetings and calendar events in your eRoom. On this page you can also start or join online meetings.
	Click to open the task pane, which lists all your open tasks from all project plans and task databases in your eRoom.
tasks (in the map)	Click to open the task pane, which lists all your open tasks from all project plans and task databases in your eRoom.
◷ members	Click to open the eRoom Members page. You can edit your own membership information or view information about other members.

add a comment	Click to add a comment to a discussion; type a comment heading in the single-line field (this is mandatory) and your comments in the box below. Click OK
Reply to this Comment	Click arrow icon to reply to an existing comment. Add a comment heading (e.g.: R*e: Projects Posting by J.Smith Feb08*) to show which comment your reply is related to.

Tips:

Email notification	You will receive an email message when a particular item changes, or anything in an eRoom changes. To turn notifications off: within the email you receive click on link notification settings. 1. In the map or item box, right-click an item's icon and pick **Notification** from the pop-up menu or select the item and click **notification** on the command button. 2. On the Notification page, pick whether you want to know about changes as they happen, just once a day, or not at all.
Access control	If you own an item, you can edit it (rather than just comment on it) and also control who has access: • Click the **access control** button on the Create or Edit page, or in the appropriate Create or Edit wizard. • Either right-click the icon and choose **Access Control** from the pop-up menu, or select it and click **access** on the command bar. You can also click the owner's name.
Create a link	You can access your eRooms from your OU Intranet Home page for quick and easy use: From the 'My Links section' click 'edit', then type **eroom.open.ac.uk** into the URL field, click 'Save' button.
logout	When leaving your eRoom, remember it is good practice to logout.